



PLANVIEW DAY 2022 ROADSHOW

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Business Agility: Transforming our Ways of Working

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Starting With the End in Mind

**ALWAYS BEGIN WITH THE
END IN MIND.**



One Step Ahead



- Recognize the need to adjust and adapt to the direction
- Enable and empower teams to react and respond faster to change
- Implement the right products and processes to enable faster decision making



Business Agility

- Business agility is the rapid, continuous, and systematic evolutionary adaptation and innovation directed at gaining and maintaining competitive advantage
- It is the agility in an organization's culture, leadership, strategy, and governance that adds value operating in an uncertain, complex, and ambiguous environment



The problem is not with our organizations realizing that they need to transform; the problem is that organizations are using managerial frameworks and infrastructure models and products from past solutions to today's problems and expecting faster results.



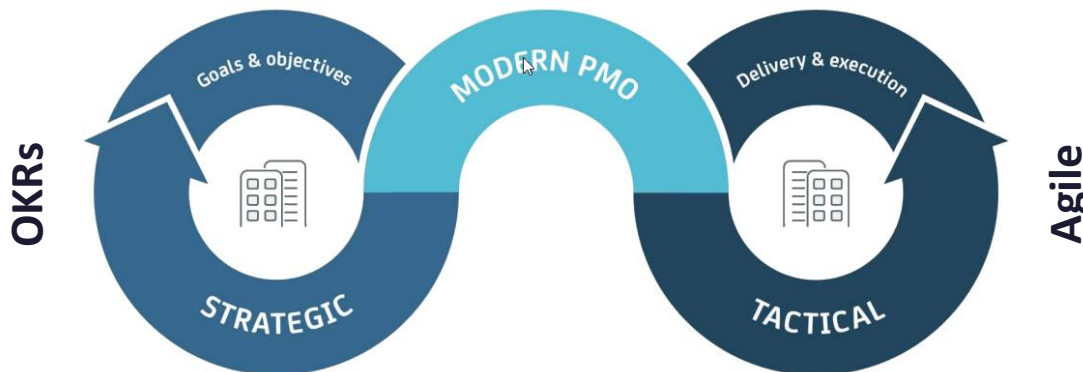
PMO and Business Agility

The technology and markets are moving faster, whereas culture and processes take time to evolve

The need for greater business agility is driving a fundamental shift in the role of the PMO globally

88% of the businesses believe that the capability to respond more quickly to opportunities should give them a distinct advantage

Majority of companies believe the PMO should be supporting business and IT Strategy development and execution, but only 30% actually doing it

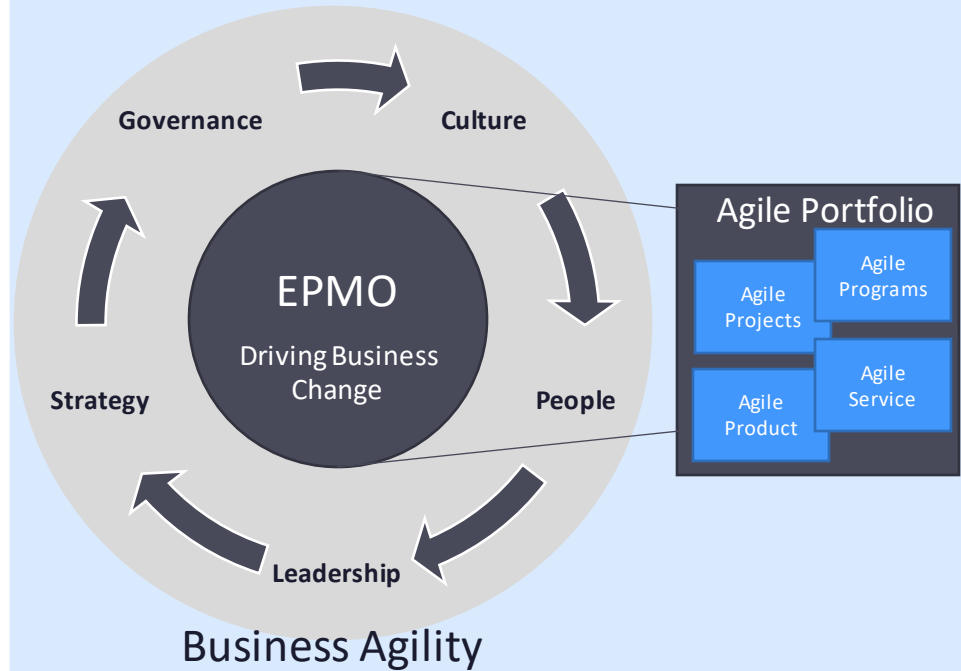


Empower the PMOs to challenge the status quo and be the leader to drive the change



What does Business Agility mean to PMO?

- Anticipate the needs of business leaders
- Prepare for the what-if scenarios
- Guide the leadership team through an assessment and prioritization of the project portfolio
- Enable faster shut down or pause of projects
- Build organizational change management capacity
- Streamline and optimize the communication process
- Enable just-in-time decision-making
- Develop a culture of Self Service with the right tools and processes
- Transition from a project to a “product” mindset



By implementing the right tools and processes you can boost agility of the organization



Implementing “Agile” is not Business Agility

- Alignment of all investments with the strategic pillars
- Connecting all silos across the organization
- Aligning and optimizing resources, capacity planning
- Orchestrating strategic roadmaps at the macro level
- Managing to clearly defined outcomes and key results
- Responding to any disruption

Agile is a way of thinking with focus on collaboration, frequent delivery of value, and the ability to deal with functionality changes

Agility is the ability of a business to respond quickly to changes, especially external changes with benefits

	INNOVATE	ORGANIZE	ENGAGE	EXECUTE	ENABLE
Business Agility	Strategy	Structure	People	Processes	Leadership
Being Agile	Product design	Governance	Culture	Technology	Way of working



You Need Agile for Agility



You have all that power to get from point A to point B quickly, but the impediment is everywhere around you.

Build smooth roads for the Lamborghini to reach its full capability rather than allow roadblocks.

Freedom with Fences

- Adopted a new vision to meet business demand of 200,000 motorcycles per year
- Enabling workers, the latitude in process improvements and creating a culture of “freedom” but within the “fences” of business strategy





Amerihealth Caritas

- AmeriHealth Caritas is one of the nation's leaders in health care solutions for those most in need
- Operating in 12 states and the District of Columbia, AmeriHealth Caritas serves more than 5 million Medicaid, Medicare, and Children's Health Insurance Program (CHIP) members
- Headquartered in Philadelphia, AmeriHealth Caritas is a mission-driven organization with more than 35 years of experience serving low-income and chronically ill populations
- Our integrated care approach has improved health outcomes for members and reduced costs for states. For more information



Blue states Existing AmeriHealth Caritas Medicaid health plan markets **Green state** New AmeriHealth Caritas Medicaid health plan market in 2020*
 ● Dual eligible special needs plan (D-SNP) ● Medicare-Medicaid plan (MMP) ● Behavioral health managed care ● Specialty pharmacy
 ● Long-term services and supports (LTSS) experience ● Pharmacy benefit management
*North Carolina Department of Health and Human Services (NCDHHS) announced contract award; go-live pending.

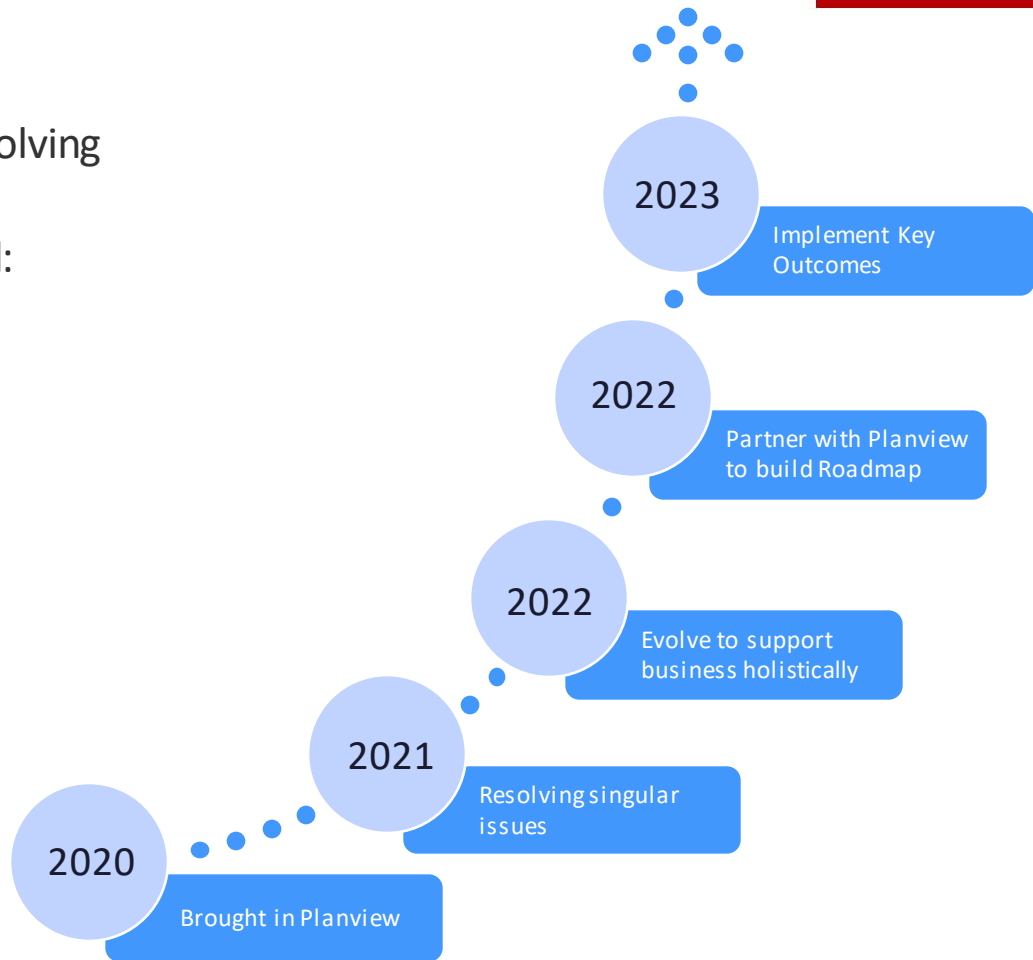
With the demands of business growth,
business agility is key.

Agile processes, delivery, governance, new
ways of working.



Our Story

- Implemented Planview enterprise-wide, solving for a short-term problem
- The following features were implemented:
 - Time Tracking
 - Project Setup
 - Project Execution
- Opportunities left on the table:
 - Strategic Planning
 - Portfolio Management and Prioritization
 - Capacity Planning
 - Agile Integration
 - Business Reporting and Metrics





Simplicity Drives Adoptability

Implementation of Planview meant:

- Control the process
- Implement governance
- Structured approach
- Using the Lifecycle feature with approvals on every step



Which meant:

- Too many hops to get project setup
- Takes much longer
- PM doesn't have control
- Lack of adoption
- Too complex for PMs thus hinders agility



Roadmap

- Need to drive thought leadership in a holistic way to support the organization
- Focus on the needs of the business and prioritize
- Implement the right tools the right way
- Collaborating with Planview – they have done it for many customers
- Taking the “product” mindset
- Product launch and training
- Product support and knowledgebase

Annual Business Planning Process

Portfolio management and prioritization

Portfolio “What if Scenarios” and scoring

Demand management

Capacity planning

Release management

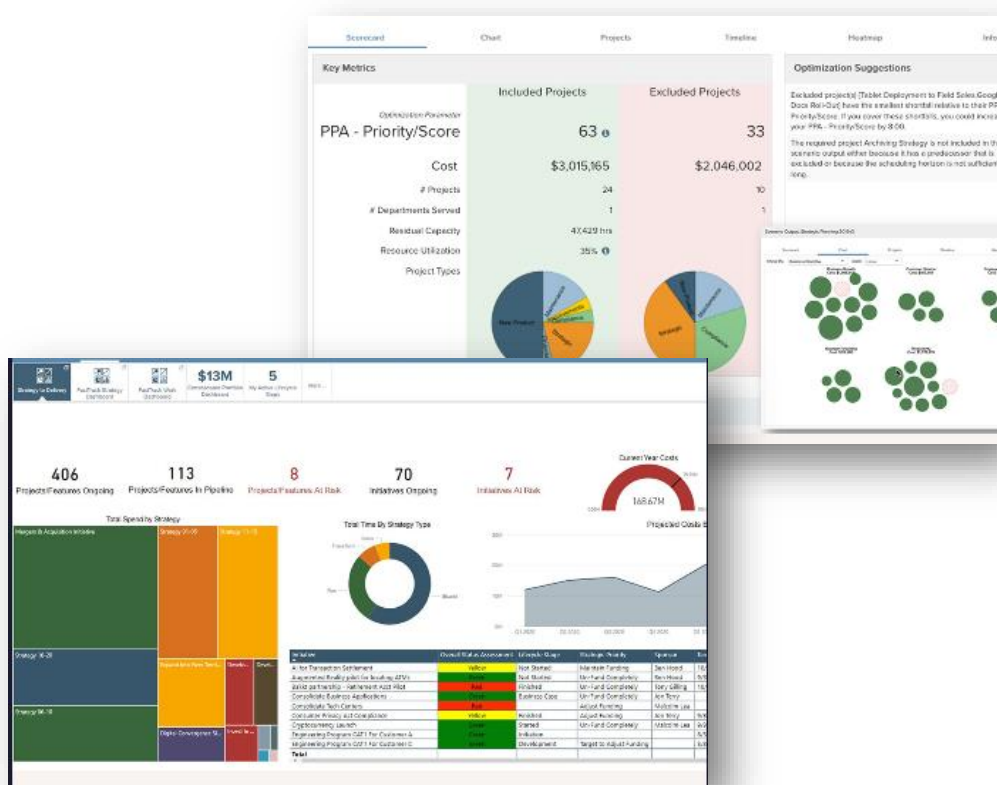
Financials

Power BI dashboards reporting

Automated workflows – driving Self Service culture

Key Features in Roadmap

- **Annual Business Planning**
 - Create structure within Enterprise One with Intake, workflows, templates, approvals, etc.
- **Portfolio Management & Prioritization**
 - Portfolio management & alignment with business strategy
 - Portfolio prioritization and ranking
 - Project scoring and business alignment
 - Portfolio balancing



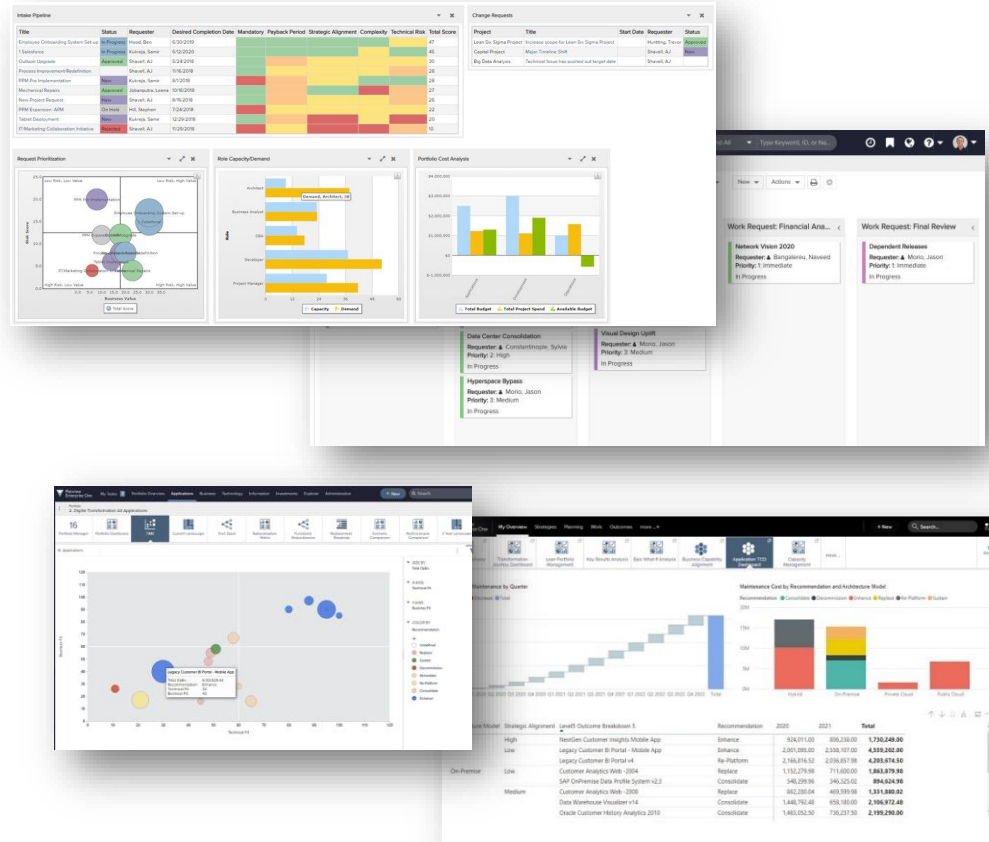
Key Features in Roadmap Cont'd

• Demand Planning

- Huge requirement for Enterprise Analytics
- Automated Work Requests
- Automated Work intake process
- Prioritization and analysis
- Convert request to work and assign
- Reporting and time tracking

• Release Planning

- Capability Mapping
- Application Lifecycles
- Application Metadata Management
- Technology Lifecycle
- Application Risk Mapping
- Impact Analysis





Key Takeaways

Business Agility is not
Agile

Be prepared for
disruption and
embrace it

Empower and enable
the PMO to drive
thought leadership and
be part of strategy

Focus on the “culture”,
create an outcome
focused workforce

Enable just in time
decision making

Implement the “right”
tools with the right
partner

Enable the culture of
self service

Look at your
organization needs
holistically



Q&A



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Thank you!

